CUSTOMER STORY

Rezco Asset Management

Scaling investment research with a cost-effective data partnership

South Africa-based Rezco Asset Management brings together a unique blend of traditional investment processes and a culture of debate and in-depth research. It also uses machine learning to process data effectively and yield returns for its clients. The asset manager's continual search for 'sweet spots' has resulted in its scalable partnerships with API-first platform alis_ and Datastream®, which help to deliver impressive investment research, marketing and cost-savings.

At Rezco our investment philosophy combines the best aspects of value investing with superior sustainable earnings growth, primary trend analysis and measured market timing.

One of our core competitive advantages lies in how we employ technology. Using the latest data processing tools as well as machine learning through our partnership with Boston, US-based alis_ we are able to interpret data faster than ever. This advance, along with access to Datastream data, allows our analysts to react to information with greater agility, making us more efficient in finding alpha for our clients.

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Keeping up with technology

Our partnership with alis_ is a key strategic focus that ensures we keep up with the latest technology trends. alis_ is an API-first technology business that provides investment technology software and services. alis.exchange is a platform as a service (PaaS) offering developed by alis_ that we use at Rezco to build, deploy and integrate our own resources and services. It removes the friction from consuming and providing scalable cloud-native services via API and/or software interfaces.

The platform also comprises investment management solutions:

- de.alis.services (data engineering as a service)
- in.alis.services (instruments referencing as a service)
- cp.alis.services (portfolio compliance as a service)
- px.alis.services (portfolios as a service)
- pt.alis.services (portfolio construction, analytics and optimisation as a service)
- alis_ Base (stock screening and monitoring software platform)
- alis_ Bridge (portfolio construction and management software platform)

Embarking on the scale-up process

In focusing on growing our operations, we chose Datastream Web Services because the solution meets our data requirements and enables us to scale up by integrating it with our products via our API – all in a cost-effective way compared with other providers.

Our ability to elegantly integrate tools from service providers is key to our investment strategy. Working with Datastream has allowed us to scale up our asset management activities with the power of focused and efficient data consumption.

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Delivering automated research efficiencies

Exploring solutions with alis_ has helped us to find sweet spots. Thanks to the templating engine in Datastream we've been able to integrate our investment and marketing teams' chart packs seamlessly. It allows us to set up a global theme so that when our investment team generates a new chart it automatically matches our brand guidelines, simplifying the process. With the global themes engine we've been able to efficiently update our brand over the last few years without having to update each chart individually.

Our chart pack updates automatically in the cloud with no dependency on a local copy, such as in Microsoft Office, to facilitate this. With alis_ we've been able to develop cloud-based updates using the Datastream API, so when we meet with clients our charts are always up to date. It's a simple concept, but when scaling this seamlessly over thousands of charts the overall impact becomes really significant.

Scaling investment research partnership: alis.exchange and Datastream

Working with Datastream product specialists, we tested at scale the integration of Datastream Web Services on alis.exchange, which allows our analysts to take a chart they have created in Datastream and instantly 'onboard' the data. This enables our analysts to use any custom formulae or expressions they use directly in Datastream.

Again, this really simplifies the investment research process for our analysts. The onboarded data is then available through de.alis.services on alis.exchange in a low-latency and bulk format for use in analyst machine learning models, screens and sheets. Our de.alis.services service manages the integration through the Datastream Web Services APIs, which synchronises the data at scale.

Another attractive feature is that data is also synchronised on demand – especially when an analyst wants to focus on a certain data set, e.g., the FTSE/JSE All Share Top 40 – significantly reducing the overall data spend. Focusing on data on demand and only the data you need is very attractive to cost-conscious asset managers. With these services we've seen a tenfold increase in the usefulness of Datastream Web Services to our business. ■

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